Managing Delegate Access & Sharing

Just as an assistant can help you manage your paper mail, your assistant can use Outlook to act on your behalf: receiving and responding to email, meeting requests, and meeting responses. You can also grant additional permissions that allow your delegate to read, create, or have full control over items in your mailbox.

If all you want is for someone to be able to see what's in one or more of your folders (your Inbox, your Calendar, etc.), just share a mail folder or share your calendar with permission set to **reviewer**.

In these examples we'll refer to the **manager** (as the person who is sharing their data) and the **delegate** (as the person who has been given access to the manager's data), but your situation may involve people in a variety of roles.

As the person granting permission, you determine the level of access that your delegate has to your folders: reviewer (read-only) through full rights to read, create, change, and delete items.

If you use the default values, your delegate will

- Have "Send on Behalf" permission, which means your delegate can compose and send meeting invitations that, when received, will say they come from "Bob Assistant on behalf of Judy Manager" (with real names, of course)
- Have full access (view, create, edit, delete) to your Calendar and Tasks folders.
- Receive your meeting requests, and responses to meeting

requests you have sent. Your delegate will not see any other messages sent to you.

- Be able to respond meeting requests on your behalf.

If you want to allow the delegate to see all of the messages in your Inbox, or be able to send messages other than meeting invitations on your behalf, you must grant additional permissions.

If you grant someone access to your folders, that person has access to all items in the folders except those marked private. Items in sub-folders are not available to the delegate unless you change the sharing permissions on each sub-folder. New sub-folders (created after the Delegate Access was established) inherit the folder access permissions of the parent folder.

1. Select **Options** from the **Tools** menu.
2. Click the **Delegates** tab, and then click **Add**.
3. Select the name of the person whom you want to designate as your delegate, or search for and select the name in the search results list.
4. Click **Add**, then click **OK**.
5. In the **Delegate Permissions** dialog box, you can accept the default permission settings (see the bullet list above) or select custom access levels for Exchange folders. If all your delegate needs is to work with your calendar and meeting requests and responses, the default permission settings are appropriate. If you want to customize your delegate's access, you'll choose from these access levels:

   Reviewer - the delegate can ***read*** items in the manager's folder.

   Author - the delegate can **read *and create items, and modify and delete items that he or she creates***. For example, a delegate can create task requests and meeting requests directly in the manager's Calendar folder and then send the item on the manager's behalf. The delegate cannot modify or delete something the manager created.

Editor - the delegate can do everything that an **Author** has permission to do ***and can modify and delete the items that the manager created***.

6. If you leave access to your Calendar set to **Editor**, you can choose whether or not your delegate automatically will be copied on meeting-related messages, using the checkbox.
7. To notify the delegate of the new permissions, select **Automatically send a message to delegate summarizing these permissions**.
8. The **Delegate can see my private items** checkbox allows your delegate to see all your private items in all folders where you've granted them any level of access: Mail, Contacts, Calendar, Tasks, Notes, and Journal folders. You cannot set access to private items in only one folder.
9. Click **OK** to close the **Delegate Permissions** dialog box.
10. If, in step 6 above, you chose to have meeting-related messages sent to your delegate automatically, in the **Options** dialog box you'll see three choices regarding who receives meeting requests and responses addressed to you.

    The first radio button routes these messages to your delegate, and sends copies to you

    The second radio button routes these messages directly to your delegate and you never see them.

Select the option that works best for you, then click **OK** to close the **Options** dialog box.

If you accepted the default access levels in step 5 above, you're done.

If you have granted any level of access to your Inbox in step 5 above, you must complete an additional series of steps.

1. In the **Navigation Pane**, click **Mail**.
2. Right-click on the line **Mailbox – *Your Name***. Please note: not your Inbox. **Mailbox**. Really.
3. From the drop-down menu that appears, select **Change Sharing Permissions**.

4. On the **Permissions** tab, click **Add**.
5. From the list, select your delegate, click **Add**, then click **OK**.
6. Back on the **Permissions** tab of the **Outlook Today** dialog box, in the section labeled **Other** (near the bottom right), put a checkmark next to **Folder visible**.
7. Click **OK**.

CHANGE PERMISSIONS FOR YOUR DELEGATE

1. On the **Tools** menu, select **Options**, then click the **Delegates** tab.
2. Click the name of the delegate for whom you want to change permissions, and then click **Permissions**.
3. Change the permissions to the desired level of access for any Outlook folder listed.
4. To send a message to notify the delegate of the changed permissions, select the **Automatically send a message to delegate summarizing these permissions** checkbox.
5. Click **OK** to close the **Delegate Permissions** dialog box.
6. Click **OK** to close the **Options** dialog box.

Note: If you want copies of meeting requests and responses that you receive to be sent to a delegate, make sure the delegate is assigned **Editor (can read, create, and modify items)** permission to your Calendar folder, and then select the **Delegate receives copies of meeting-related messages sent to me** checkbox.

REMOVE PERMISSIONS FOR YOUR DELEGATE

1. On the **Tools** menu, select **Options**, then click the **Delegates** tab.
2. Click the name of the delegate for whom you want to change permissions, and then click **Remove**.

Click **OK** to close the dialog box.

Sharing Your Mail Folder(s)

Folder Sharing lets you give others access to your mail folders. You specify which folder, and the level of access, that is, whether the delegate can simply see items in a folder, or whether they can create, edit, and/or delete items.

If you want to allow someone to send messages "on behalf of" you, you need to use Delegate Access.

Note: Items in any existing sub-folders of the folder you share are not available to the person unless you change the sharing permissions on each sub-folder. However, new sub-folders (created after sharing rights were set) inherit the folder access permissions of the parent folder.

If you are sharing any folder other than your **Inbox**, be sure to follow the steps in both **part one** and **part two** below.

PART ONE - SHARING THE CONTENTS OF A FOLDER

This example shares your Inbox, but you can share any mail folder on the Exchange server. If you share a folder other than your Inbox, be sure also to follow the steps in Part Two below.

1. In the **Navigation Pane**, click **Mail**.
2. Right-click the folder you want to share. From the menu that appears, click **Change Sharing Permissions**. A **Properties** dialog box will open with the **Permissions** tab displayed. Note: you can only share folders on the Exchange server, not local folders.
3. In the **Add Users** dialog box, type all or part of the person's name, then click **Go**.

4. Highlight their name in the resulting list, click **Add**, then click **OK**. You should now see their name displayed in the **Properties** dialog box.
5. From the **Permission Level** drop-down list, select the desired level of access. Short version: **Reviewer** - the person can read items in the manager's folder, but can't add, delete, or change anything. **Author** - the person can read and create items, and can modify and delete items that he or she creates. For example, the person can create task requests and meeting requests directly in the manager's Calendar folder. The person cannot modify or delete something the manager created. **Editor** - the person can do everything that an Author has permission to do and can modify and delete the items that the manager created.
6. Click **OK**.

PART TWO - MAKING HIGHER-LEVEL FOLDERS VISIBLE

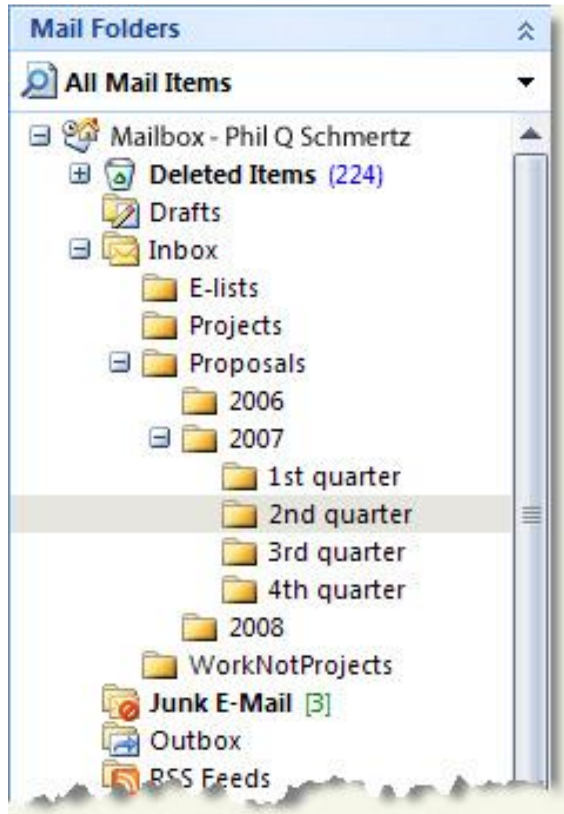
If you shared your **Inbox** in Part One above, you do not need to read any further or do any of the steps here in Part Two.

If you shared something **other than your Inbox**, that is, a folder lower in the hierarchy, you'll also need to make the "parents" of that folder visible, right up to the Inbox. Your delegate will not be able to see the items in each folder (unless you use the steps above), but they need to be able to see the folders themselves in order to see the sub-folder where you want them to see the contents.

For example, in the screenshot shown here, assume we wanted to share the **2nd quarter** folder. For this folder to be visible, we need to make all of its parents visible: **2007**, **Proposals**, and **Inbox**. We'd need to complete the steps below three times, once for each of those folders.

The steps here are similar to part one (above), but step 5 is where it gets different.

1. In the **Navigation Pane**, click **Mail**.
2. Right-click the folder you want to share. From the menu that appears, click **Change Sharing Permissions**. A **Properties** dialog box will open with the **Permissions** tab displayed. Note: you can only share folders on the Exchange server, not local folders.



3. In the **Add Users** dialog box, type all or part of the person's name, then click **Go**.
4. Highlight their name in the resulting list, click **Add**, then click **OK**. You should now see their name displayed in the **Properties** dialog box.
5. Click on the person's name, then click to put a checkmark next to **Folder Visible** in the **Other** section. Do not change the Permission level.
6. Click **OK**.
7. Repeat these steps as necessary to make each "parent" level visible.

Sharing Your Outlook Calendar

By default, everyone has limited access to your calendar. As they create a meeting invitation using the Scheduling Assistant, they will be able to see whether you are free or busy, but they won't be able to see any other information about your schedule (such as the meeting title, who is invited, or where it's taking place).

Sharing your calendar allows people to look at the items on your calendar in more detail. You specify whether this access is read-only, or includes the ability to create and/or edit items on your calendar.

If you want to allow someone to send invitations "on behalf of" you, you need to use Delegate Access.

SHARING YOUR CALENDAR WITH EVERYONE AT CORNELL

This option changes what everyone at Cornell can see about your calendar.

6. In the **Navigation Pane**, click **Calendar**.
7. Below the heading **My Calendars**, you'll see the entry **Calendar**. That's the entry we'll be working with in the following steps.
8. Right-click **Calendar**. From the menu that appears, click **Change Sharing Permissions**. A **Calendar Properties** dialog box will open with the **Permissions** tab displayed.
9. Click **Default**. (Do not, for any reason, delete this entry. Deleting it will cause errors.)
10. From the **Permission Level** drop-down list, select the desired level of access. We recommend that you choose one of these: **Free/Busy time, subject, location** - in the Scheduling Assistant, everyone can see time, subject, and location of the items on your calendar, but cannot see other details, such as participants, notes, or attachments. **Reviewer** - everyone can open your calendar and see the details of the items on your calendar, but can't add, delete, or change anything. (The initial

setting is "Free/Busy," which allows everyone to view your free/busy time in the Scheduling Assistant, but they cannot see the subject or location, and they cannot open your calendar.)

11. Click **OK**.

SHARING YOUR CALENDAR WITH SPECIFIC PEOPLE

By email invitation

This method lets you share your calendar by sending an email notification to the person. This is a quick way to give someone read-only access to your calendar. For more options, see "By setting permissions in Outlook" below.

1. In the **Navigation Pane**, click **Calendar**.
2. In the **My Calendars** section of the **Navigation Pane**, click **Share My Calendar**. An email message will open with the subject "Sharing invitation."
3. Fill in the **To** field as you would for any email message.
4. (optional) If you would like to request access to this person's calendar, check **Request permission to view recipient's Calendar**.
5. In the body of message include whatever explanatory text you feel is appropriate.
6. Click **Send**.
7. The recipient will be able to view your shared calendar by going to **Calendar**, clicking **Open a Shared Calendar**, and typing your name.

By setting permissions in Outlook

This option lets you choose which level of access to your calendar you want to give someone.

1. In the **Navigation Pane**, click **Calendar**.
2. Below the heading **My Calendars**, you'll see the entry **Calendar**. That's the entry we'll be working with in the following

steps.

3. Right-click **Calendar**. From the menu that appears, click **Change Sharing Permissions**. A **Calendar Properties** dialog box will open with the **Permissions** tab displayed.
4. Click **Add**.
5. In the **Add Users** dialog box, type all or part of the person's name, then click **Go**.
6. Highlight their name in the resulting list, click **Add**, then click **OK**. You should now see their name displayed in the **Calendar Properties** dialog box.
7. From the **Permission Level** drop-down list, select the desired level of access. (What do these choices mean?) Short version: **Free/Busy time, subject, location** - in the Scheduling Assistant, the person can see time, subject, and location of the items on your calendar, but cannot see other details, such as participants, notes, or attachments. **Reviewer** - the person can open your calendar and see the details of the items on your calendar, but can't add, delete, or change anything. **Author** - the person can can open your calendar and see the details of the items on your calendar, and can create, modify, and delete items that he or she creates. The person cannot modify or delete something the manager created. **Editor** - the person can do everything that an Author has permission to do and can modify and delete the items that you created.
8. Click **OK**.